

INVESTMENT FORUM AGENDA
WEDNESDAY, MAY 25, 2022, 10:30AM

We will begin meeting at 10:30AM this week. You may attend in person in TA-1, or by Zoom. To attend in person, you must download your proof of vaccination. The daily health questionnaire to visit the Mason campus is no longer required.

New OLLI name tags with a QR code are available in TA-1 when you next come to an in-person session. These can be scanned to sign in to in-person classes.

The Zoom meeting link and ID will be in the Daily Schedule, which will be forwarded by OLLI on Wednesday morning.

Registration for the Summer Term begins May 23, and ends June 1.

Markets.

More of the same, with the S&P hitting correction territory (down 20% from its high) on Friday, before ending the session just shy of a correction. For the week the DOW was down 2.9%; the S&P was down 3.1%, and NASDAQ was down 3.8%; and the Russell 2000 was down 1.1%. The big news was the disappointing results announced by WalMart (WMT) and Target (TGT,) signifying weakening retail sales from inflation.

Friday's market. Who can make reasoned investment decisions with the wild swings during the day?

Topics this week.

The week that was. We will lead off our discussions with recent market moves.

Healthcare/Pharma sector (continued.) Last week, we heard about the risks of companies in the healthcare/pharma sector. (Those of you who were expecting hot stock tips were disappointed!) This week, let's follow-up that discussion with the bull case for healthcare. Many of us own the big healthcare names, have some understanding the risks, and are pleased with the returns in healthcare.

Bob Baker will look at the buys and sells from this week, and also from the previous week that we did not cover last week.

Other

Investment Forum Website.

The Investment Forum website may be accessed at <https://olli.gmu.edu/>, then pressing the “Clubs & Activities” link in the center of the OLLI home page, followed by the “Inve\$tment Forum” link on the dropdown list. Please contact Jim Coile, the Webmaster with any presentation contributions, article suggestion, or improvements by email, ctj444@icloud.com The website has current and past agendas and buy/sell lists and other presentations.

Al Smuzynski
Investment Forum Moderator
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Buy/Sell list – week ending 05/20/22

Symbol	Description	Sector	Industry	Market Cap	P/E (ttm)	Ex-Date	Dividend Yield	Dividend
▼ BUY: 05/16 - 05/20								
VZ	Verizon Communicatn	Communication Services	Diversified Telecommunication Services	208.01B	9.53	04/07/20	5.17	2.56
BG	Bunge Limited F	Consumer Staples	Food Products	16.60B	9.22	08/18/20	1.93	2.10
CB	Chubb Ltd F	Financials	Insurance	86.91B	11.31	06/16/20	1.57	3.20
CFG	Citizens Finl Group Inc	Financials	Banks	18.70B	8.35	05/02/20	4.09	1.56
CSWC	Capital Southwest Corp	Financials	Capital Markets	515.84M	15.28	06/14/20	11.88	2.67
JPM	Jpmorgan Chase & Co	Financials	Banks	344.63B	9.06	07/05/20	3.41	4.00
DE	Deere & Co	Industrials	Machinery	96.12B	21.27	03/30/20	1.33	4.20
AAPL	Apple Inc	Information Technology	Technology, Hardware, Storage & Peripherals	2,226.92B	24.32	05/06/20	0.67	0.92
MSFT	Microsoft Corp	Information Technology	Software	1,888.90B	27.85	05/18/20	0.98	2.48
▼ SELL: 05/16 - 05/20								
SCHB	Schwab U.S. Broad Market	--	--	19.60B	--	03/23/20	1.51	0.69
C	Citigroup Inc	Financials	Banks	96.61B	6.00	04/29/20	4.09	2.04
BMJ	Bristol-Myers Squibb	Health Care	Pharmaceuticals	162.21B	27.71	03/31/20	2.83	2.16
CSCO	Cisco Systems Inc	Information Technology	Communications Equipment	178.38B	18.07	04/05/20	3.55	1.52
▼ THINKING ABOUT: 05/16 - 05/20								
F	Ford Motor Co	Consumer Discretionary	Automobiles	50.25B	4.71	04/25/20	3.20	0.40